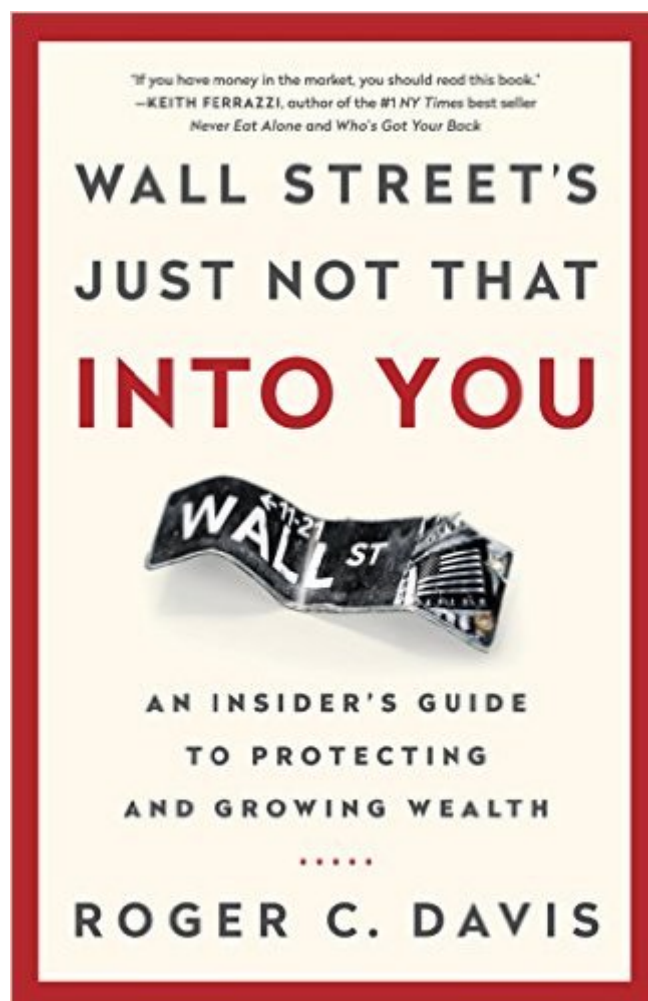


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# Wall Street's Just Not That Into You: An Insider's Guide To Protecting And Growing Wealth



## Synopsis

Do you consider yourself a long-term investor? If so, chances are you have parked your money with an advisor and pay little attention to its performance and even less to the amount of risk in your portfolio. You may be told by Wall Street to buy stocks or funds and hold them, or to create a diverse portfolio to protect yourself from risk and downturns in the market. Truth be told, new studies show this approach may not be serving the long-term investor well. In his new book, Roger Davis reveals point-blank that Wall Street's "one-size-fits-all" approach and why even wealthy investors should be wary. Davis, who has two decades of experience managing funds, raises valid questions about traditional investment techniques, exposing the inherent dangers of relying on any one technique as a primary risk management tool. As a reader, you will be taught critical, innovative strategies like how to stress test your portfolio and close your losers. Davis reveals that most investors are less concerned about making a sizeable return on their investments than they are about protecting their wealth; yet many investors have the same unprotected exposure to the stock market that they did in 2008. This book offers investors specific steps they can take to reduce investment risk and the right questions to ask of their current advisors to understand whether they should make a change. Refreshingly candid and highly informative, Wall Street's Just Not That Into You offers a bold and thought-provoking alternative to the many books that offer up the same old principles of years gone by.

## Book Information

File Size: 1634 KB

Print Length: 153 pages

Publisher: Bibliomotion, Inc. (November 3, 2015)

Publication Date: November 3, 2015

Sold by: Digital Services LLC

Language: English

ASIN: B00YHTSIDG

Text-to-Speech: Enabled

X-Ray: Not Enabled

Word Wise: Enabled

Lending: Not Enabled

Enhanced Typesetting: Enabled

Best Sellers Rank: #350,041 Paid in Kindle Store (See Top 100 Paid in Kindle Store) #51

inÂ Books > Business & Money > Finance > Financial Risk Management #114 inÂ Books >

Business & Money > Finance > Wealth Management #557 inÂ Kindle Store > Kindle eBooks >

Business & Money > Investing > Investing Basics

## Customer Reviews

When this book was available on Kindle for a buck I thought it would be worth finding out what would be said about 'protecting and growing wealth' in a time of economic peril. What I found was disappointing. Although the general concepts are sound (such as starting by understanding your needs and wants, both now and in the future, especially in retirement, and making a plan based on those discoveries), that kind of advice has been covered many other places before. So what about the specific bit of wealth protection and growth? As another review noted, the recommendations here are definitely counter to the 'buy and hold' mentality, but there are precious few details about what should be done instead. Well maybe that's not quite right -- the advice throughout the book is to buy when things are low, even if they are not still at the bottom, and sell when they're high, even if they are already past their peak. I think there is just one page in the book that tries to be more specific than that, and it basically says to compare the current price of the equity to the 200 day moving average. That's it, except for the open invitation at the end of the book to contact the author's wealth management firm. It seemed like the author was sincere about giving guidance for how to make financial decisions by thinking about more than just obtaining money and assets, but that's not why I picked up this book -- I wanted to understand something about the author's methods. The advice I wanted to find here was something more than 'become my client,' but in the end that seemed to be the message.

Roger Davis advances several debatable concepts. The first one is how he defines 'Wall Street.' He defines the latter as the clan of protagonists who promote 'buy-and-hold' asset allocation, diversification, and indexing investment strategies. But, such strategies are actually pretty much 'anti-Wall Street' as they promote a very efficient and low cost investing that actually prevents the Street to generate fee revenues and commissions by churning their clients' investments. Instead, Roger Davis is 'Wall Street'. Before starting his own investment firm based on active management and associated with the occasional churning of his clients' investment accounts that generate lucrative fees for his firm he worked for a long time for UBS, a

humongous Swiss Bank long part of the international Wall Street establishment that nearly collapsed during the Financial Crisis. Roger Davis spends 140 very short breezy and reasonably entertaining pages hammering at the supposed flaws of buy-and-hold strategies. He supposedly demonstrates the weaknesses of such strategies by showing graphs of the stock market bubble from 1922 to 1929 and the ensuing spectacular crash from April to June of 1930. He repeats this visual analysis for the recent Housing Bubble/Financial Crisis on pages 20 and 21. In both cases, the trends appear readily apparent as they go straight up during the bull phase of the market and straight down during the ensuing correction-crash. But, all that demonstrates is hindsight bias. After the fact, yes all those trends are really apparent. But, into the future they are much less so! However, Roger Davis does believe that such trends are readily apparent prospectively. After hammering at the buy-and-hold model for most of the book, he finally unveils his secret strategy on page 104.

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